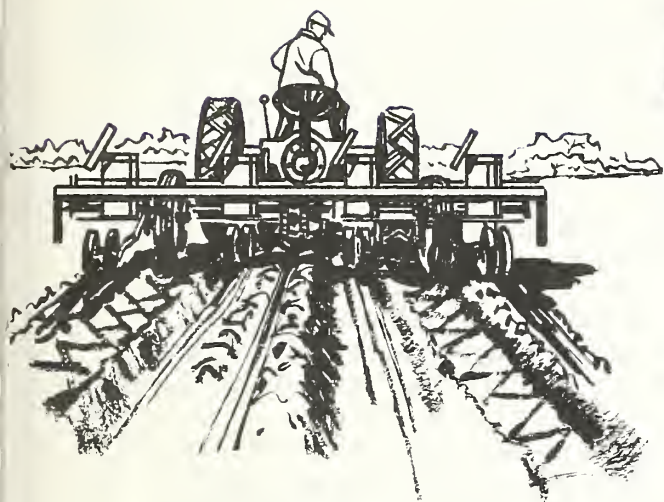


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1968 ACREAGE- MARKETING GUIDES



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VEGETABLES FOR COMMERCIAL PROCESSING

U.S. DEPARTMENT OF AGRICULTURE-CONSUMER AND MARKETING SERVICE

February 1968 AMG 60



PREFACE

Acreage-Marketing Guides are prepared each year for major vegetables used for canning and freezing. The commodities included are lima beans, snap beans, beets, cabbage for kraut, sweet corn, cucumbers for pickles, green peas, spinach and tomatoes.

A substantial portion of these vegetables is grown on acreage contracted in advance of planting time. Contracting has been a feature of the vegetable processing industry for many years and has been beneficial to both farmers and processors. The farmer with a contract is reasonably assured of an outlet for his crop and price risks are reduced. The processor benefits by assurance of adequate supplies of raw materials, at predetermined prices, to fill his pack schedules.

For effective and equitable contracting, both growers and processors must be fully acquainted with the economic forces affecting the industry. Processors make the basic decisions concerning the acreage required. They must translate prospective markets for their finished products into acreage and production levels. As each processor estimates market potential, he must consider carefully all factors influencing the production and marketing of his products.

The grower should also be aware of market developments for the various commodities so that he can bargain with processors on a realistic basis. Some production influences, such as extremes of the weather, refuse control. But producers have full control over plantings. Thus, they can contribute importantly to balanced market conditions by planting acreages which are likely to result in sufficient supplies to satisfy consumer needs, but insufficient to result in depressed prices.

USDA's Consumer and Marketing Service continually studies markets for various vegetable products. On the basis of this, commodity specialists develop recommendations of acreage levels which are likely to result in supplies which equal market needs. In turn, these recommendations are reviewed by representatives of other USDA agencies who are familiar with the vegetable industry.

The final recommendations for 1968 vegetables for commercial processing are presented in this publication. In the past when acreage has been held within the levels recommended by USDA, few marketing difficulties have been encountered.

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1968 ACREAGE-MARKETING GUIDES

VEGETABLES FOR COMMERCIAL PROCESSING

I. PROCESSED VEGETABLE HIGHLIGHTS

The total supply of canned and frozen vegetables available for 1967-68 marketing season was moderately above the two prior seasons, when supplies of some items were comparatively small. Into the mid-winter of 1967-68, the cumulative disappearance of processed vegetables continued at a high rate. For most items, prices (f.o.b. processor) continued to hold at high levels. However, during the late winter, prices may average lower compared with early in the season when need for substantial replenishment of inventories helped to firm demand and prices.

The 1967 aggregate canned carryover of 8 vegetables was about a tenth below 1966. The combined pack of the 8 vegetables in 1967 was 15 percent above 1966. And at the start of the 1967-68 season, the total supply of principal canned vegetables was about a tenth more than in 1966-67.

In addition to the principal vegetables, the 1967 carryover of cucumbers for pickles was heavy, and the 1967 pack is indicated to be substantially above 1966. The initial total supply of cucumbers for pickles for the 1967-68 season was well above last year.

The aggregate 1967 carryover of 5 frozen vegetables (lima and snap beans, sweet corn, green peas and spinach) was 8 percent above 1966. The overall pack in 1967 was moderately above 1966. The pack of green peas, the top item, was up moderately. But sweet corn, second in rank in volume among frozen vegetables, was off 4 percent. The initial frozen supply, carryover plus pack, for the 1967-68 season was a record and 5 percent above 1966-67.

At the end of 1967, cold storage holdings of frozen vegetables (excluding french fried potatoes) were 1,367.2 million pounds, 14 percent more than the 1,203.9 million on hand a year earlier. Although the upward trend in the disappearance of frozen vegetables is expected to continue in 1967-68, the gain probably will not be as large as in 1966-67. Consequently, the 1968 carryover of frozen vegetables is expected to be up from 1967.

The total plantings of 9 principal vegetables in 1967 reached a new record of nearly two million acres, 7 percent more than in 1966. Acreages of all major vegetables grown for canning were increased in 1967. Also, plantings of snap beans, green peas, and spinach for freezing were larger than a year earlier, but acreages of lima beans and sweet corn were reduced slightly.

The total production of 9 vegetables for processing in 1967 amounted to 9.8 million tons, 11 percent more than in 1966. An increase in production was reported for all 9 vegetables. This substantial increase in output was accomplished despite adverse spring weather which created much uncertainty about crop potential.

Excessively wet conditions interrupted planting schedules and unusually low temperatures retarded early growth. The weather was generally favorable

during the summer. And open fall weather permitted completion of harvest, which for some items, was quite late.

The total production of vegetables for canning in 1967 was 12 percent more than in 1966. Increases as compared with a year earlier ranged from large to very large for all major items, except spinach, which was up moderately. Substantial gains over 1966 also were reported for frozen snap beans, green peas, and spinach. Production of sweet corn for freezing, however, was down moderately from 1966. The total production of the five major vegetables for freezing was 3 percent above 1966.

With an adequate to large supply of processed vegetables available to markets during the remainder of the 1967-68 season, the need and resulting disappearance for individual processed items may be held in check. Last season, for example, the tight supply of some individual items helped to increase interest in those items in relatively heavy supply. The 1968 carryover of processed vegetables is likely to be above 1967.

The acreage-marketing guide recommendations for 1968 vegetables for processing reflect the somewhat larger inventories. These recommendations call for a moderate reduction in acreage for several vegetables for processing.

Acreage and production trends for vegetables for processing are shown in Figure 1. Yield per acre of vegetables is affected greatly by weather. In addition, a switch to new or different varieties has affected yields, as has the growing use of mechanical harvesters. For 8 vegetables in 1967, the overall yield was 5.3 tons per acre, about the same as the 1961-65 average.

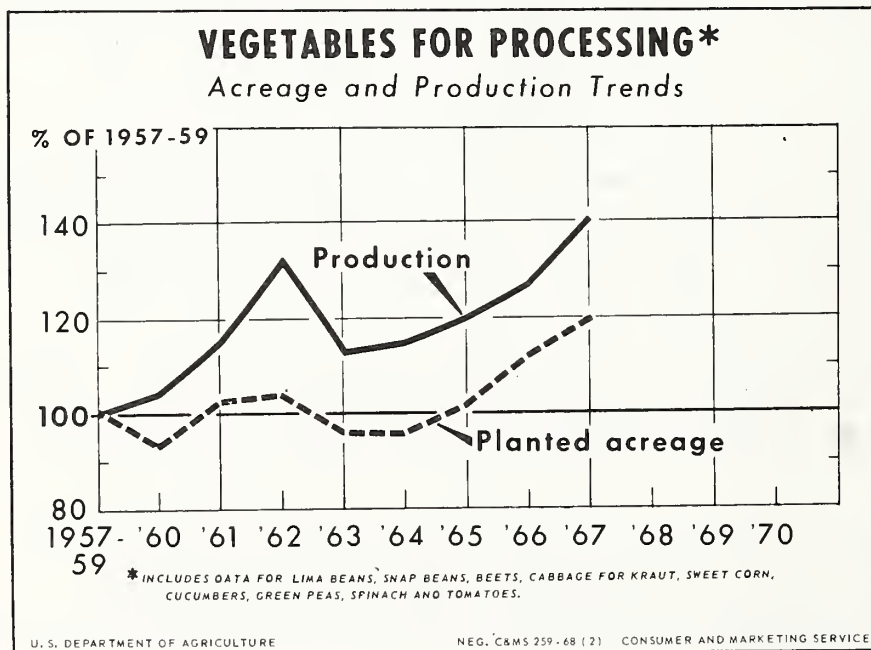


Figure 1

II. SUMMARY OF RECOMMENDATIONS FOR 1968

The total acreage guide for 8 vegetables in 1968 is a planted acreage moderately less than in 1967. Such an acreage, with normal abandonment and average yield for individual crops, will result in an aggregate production slightly less than in 1967. In addition, the guide for cabbage for sauerkraut is a recommendation for an acreage in 1968 equal to 1967.

If production in 1968 is in line with the marketing guides, the supplies of processed vegetables (carryover plus pack) available for marketing in 1968-69 would be adequate for market requirements.

Recommendations as to percentage change in acreage in 1968 for individual vegetables for processing follow:

Commodity		Percentage change from 1967 acreage
		<u>Percent</u>
Beans, Lima	(For canning).....	No change
	(For freezing).....	No change
Beans, Snap	(For canning).....	Minus 5
	(For freezing).....	No change
Beets.....		No change
Cabbage for Kraut.....		No change <u>1/</u>
Corn, Sweet	(For canning).....	Minus 5
	(For freezing).....	Minus 5
Cucumbers for Pickles.....		No change
Peas, Green	(For canning).....	Minus 5
	(For freezing).....	No change
Spinach	(For canning).....	No change
	(For freezing).....	Minus 10
Tomatoes.....		Minus 5

1/ Recommendation for early fall cabbage, fresh market and processing.

III. DEMAND FOR VEGETABLES IN 1968

Growth in the American economy, which picked up during the second half of 1967, is continuing during 1968. In its 84th month, this has been the longest expansion in U.S. economic history.

Demand for goods and service both in the consumer and governmental sectors is expected to continue rising. Capital outlays by businessmen are expected to increase slightly and further recovery in homebuilding is anticipated unless credit conditions are tight. The increase in aggregate economic activity in 1968 may exceed the 1967 rise but is not expected to match the large 1966 gain. However, the general price level may rise further in the coming year. The increase could be as large as this year and perhaps larger, depending importantly on wage settlements, productivity gains and possible changes in tax rates.

Advancing output, employment and wage rates will lead to increases in consumer disposable income. Although an increase in tax liabilities would moderate the rise in disposable income, further gains in consumer spending for food and other goods and services are expected.

The demand for principal canned and frozen vegetables in 1968-69 is expected to continue firm. Per capita use of several items is increasing (see Figures 2 to 5). Market strength for processed vegetables will be aided directly by the growing population, and indirectly by the gain in net disposable income of consumers. However, the aggregate exports of canned vegetables may continue to decline largely because of fewer exports of asparagus, tomatoes and tomato products. The rising volume of imports of tomato paste and sauce (see Foreign Trade) will add to competitive pressures in domestic markets.

Requirements for individual processed commodities are not likely to be substantially different from 1967. Prices for each particular vegetable will, as usual, depend largely on the balance between supply and demand for that commodity. Marketing success will also depend importantly on weather and timeliness of harvests.

The total value of principal vegetables for processing in 1967 was \$526 million, up 21 percent from the \$433 million estimated for 1966. California growers received a third of the total value, with much smaller shares received in Wisconsin and Washington, the second and third States in rank in value.

IV. FOREIGN TRADE

Asparagus, tomato juice, sweet corn, canned tomatoes and tomato concentrate were the leading canned vegetable export items in 1966-67. Due to a reduced domestic pack of some items plus resulting higher domestic prices, coupled with increased supplies overseas, the total volume of canned vegetable exports has been declining sharply. The exception has been an upward trend in exports of canned sweet corn (see Table 1).

The principal canned vegetables imported are green peas, tomatoes and

tomato concentrates. Import volume for the latter commodity more than doubled in 1966-67. And in the five months ending November 30, 1967 imports of tomato concentrate amounted to almost 3.5 million cases (24/303 equivalent) which exceeded the 12-month 1966-67 total of 3.2 million cases.

Portugal has become the major source for imports of tomato paste replacing Italy, formerly the major foreign supplier. The overseas expansion in the production of canned tomatoes and tomato products has resulted in a reduction in U. S. exports.

In 1968-69, foreign markets will likely utilize only a small percentage of the total supply of principal canned vegetables. Competitive pressures arising from imports of tomato products and canned tomatoes likely will increase.

V. GUIDE SUMMARY TABLES

Guide Summary Tables are presented on pages 12 and 13. The 1968 acreage guide for 8 principal vegetables for processing is a total acreage 4 percent less than in 1967. Such an acreage, with normal abandonment and average yield for individual vegetable crops, will result in a total production 4 percent less than in 1967, but 11 percent more than the 1962-66 average.

Table 1.--Selected Canned Vegetables: Imports and exports

Commodity	Marketing Season				
	: 1966-67	: 1965-66	: 1964-65	: 1963-64	: 1962-63
	1,000 cases basis 24/303's				
<u>Imports</u>					
Peas, green 1/	151.0	158.5	116.8	40.9	132.0
Tomatoes 2/	4,536.3	4,176.2	3,370.7	3,266.2	5,100.0
Tomato Concentrates 2/	3,211.6	1,571.7	627.0	635.6	977.5
<u>Exports</u>					
Asparagus 3/	1,286.4	1,333.5	2,650.0	2,652.6	2,609.2
Beans, Green 2/	182.5	327.4	174.9	201.4	893.5
Corn, Sweet 4/	647.0	512.8	409.4	365.8	289.1
Peas, Green 1/	239.0	281.2	202.6	274.4	200.2
Tomatoes 2/	436.8	473.4	756.5	327.0	133.1
Tomato Concentrate 2/	343.1	468.6	554.0	572.1	520.0
Tomato Juice 2/	780.8	855.3	1,234.9	1,297.0	1,076.8

1/ Year beginning June 1. 2/ Year beginning July 1. 3/ Year beginning April 1. 4/ Year beginning August 1.

Source: Bureau of the Census, U. S. Department of Commerce.

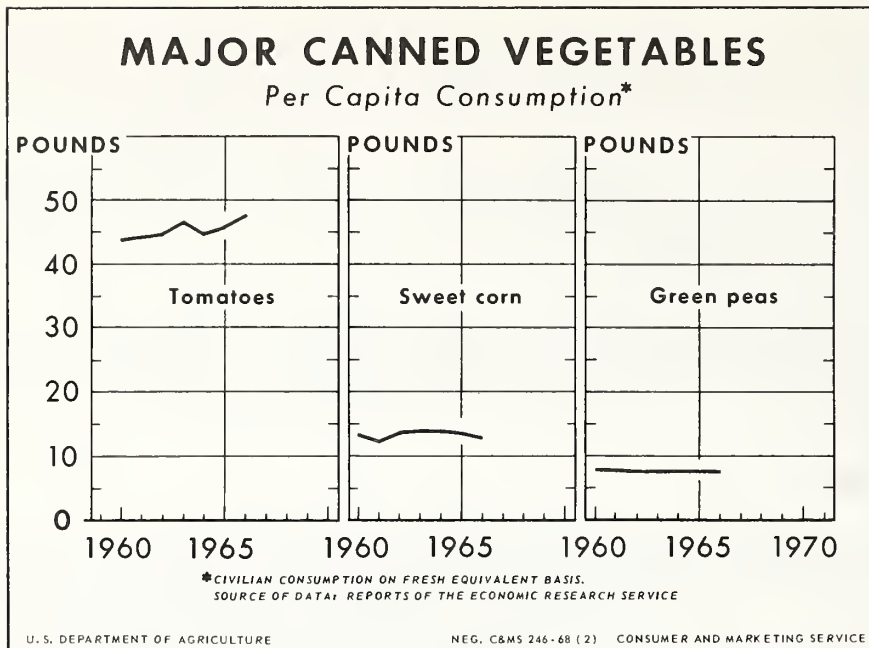


Figure 2

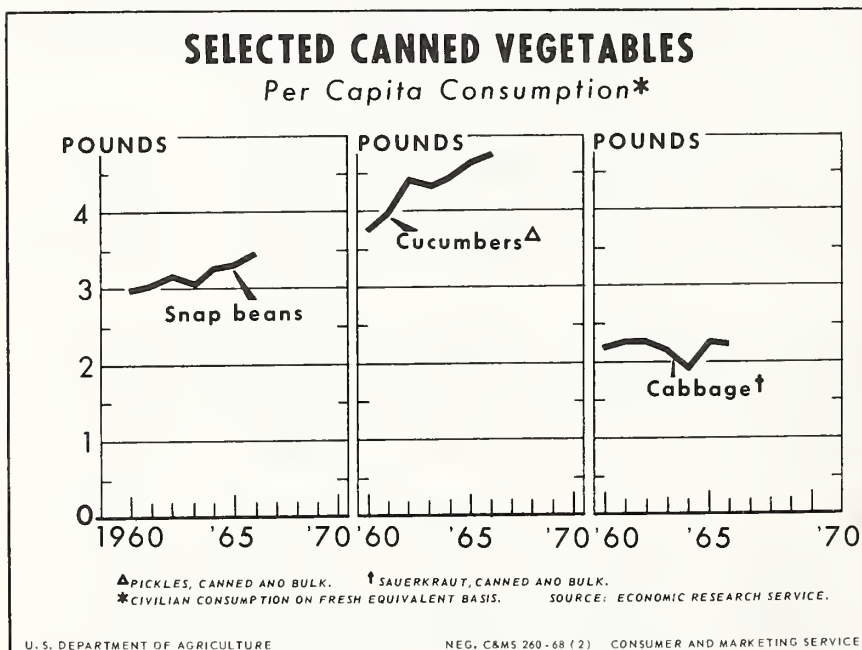


Figure 3

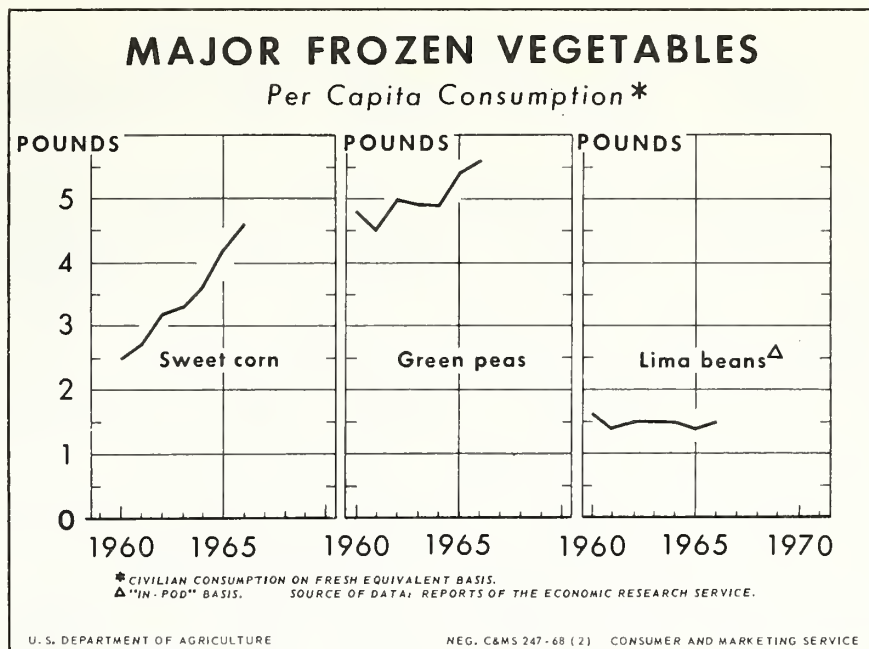


Figure 4

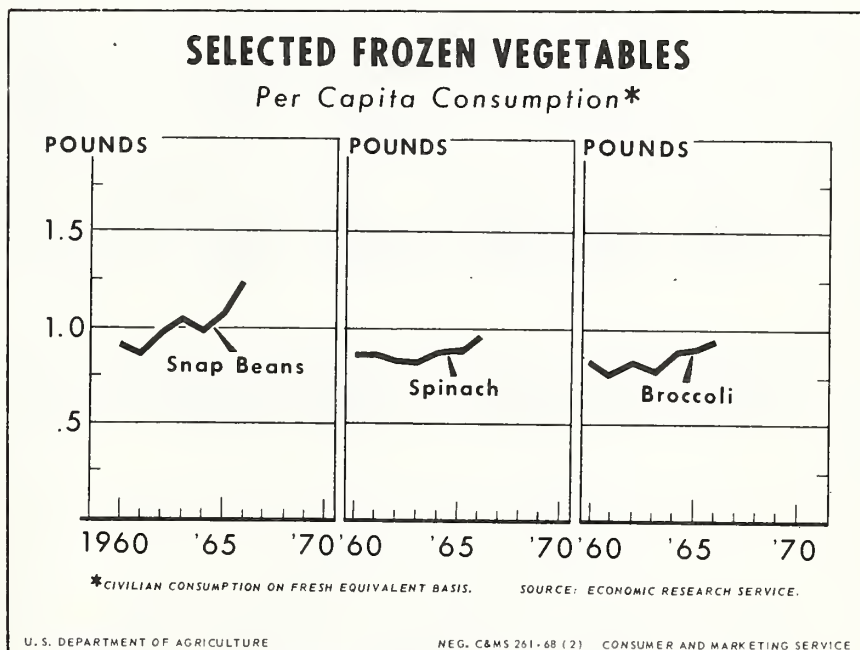


Figure 5

Table 2.--Commercial Vegetables for Processing: Acreage Guide for 1968, with comparisons

Commodity	Planted acreage										Percent Acreage Guide is of:			
	: Guide		: Prel.		: 1966		: 1965		: 1964		: Prel.		: 1966	
	: 1968	: 1967	: 1967	: 1966	: 1966	: 1965	: 1965	: 1964	: 1964	: 1964	: 1967	: 1967	: 1966	: 1965
	1,000 acres										Percent			
Beans, Lima														
For canning	39.7	39.7	39.7	33.6	28.4	23.2	100	118	140	171				
For Freezing	65.6	65.6	65.6	67.4	61.8	56.1	100	97	98	117				
Total	105.3	105.3	105.3	101.0	90.2	79.3	100	104	117	133				
Beans, Snap														
For Canning	213.1	224.3	224.3	199.6	192.9	173.2	95	107	110	123				
For Freezing	71.6	71.6	71.6	66.6	53.6	57.1	100	108	134	125				
Total	284.7	295.9	295.9	266.2	246.5	230.3	96	107	115	124				
Beets	19.5	19.5	19.5	17.7	15.7	17.0	100	110	125	115				
Cabbage for Kraut 1/														
Corn, Sweet														
For Canning	362.5	381.6	381.6	340.6	323.0	284.8	95	106	112	127				
For Freezing	121.5	127.9	127.9	129.2	107.6	85.1	95	94	113	143				
Total	484.0	509.5	509.5	469.8	430.6	369.9	95	103	112	131				
Cucumbers for Pickles	164.3	164.3	164.3	146.6	114.4	116.5	100	112	144	141				
Peas, Green														
For Canning	299.3	315.0	315.0	313.2	293.8	279.2	95	96	102	107				
For Freezing	169.0	169.0	169.0	162.9	168.7	157.8	100	104	100	107				
Total	468.3	484.0	484.0	476.1	462.5	437.0	97	98	101	107				
Spinach														
For Canning	14.6	14.6	14.6	13.1	12.8	15.3	100	111	115	96				
For Freezing	14.8	16.4	16.4	13.8	13.6	12.7	90	107	108	116				
Total	29.4	31.0	31.0	26.9	26.4	28.0	95	109	112	105				
Tomatoes	315.3	331.9	331.9	306.0	261.0	276.1	95	103	121	114				
Total	1,870.8	1,941.4	1,941.4	1,810.3	1,647.3	1,554.1	96	103	114	120				

Note: Data rounded, but percentage comparisons based on unrounded data.

1/ Included in early fall cabbage - fresh market and processing combined.

Table 3.--Commercial Vegetables for Processing: Probable production in 1968, with comparisons

Commodity	Production					Probable production from Acreage				
	1,000 tons					Guide as percent of:				
	1/	Guide	Prel.	1966	1965	1964	Prel.	1967	1966	1965
	1968	1967	1966	1965	1964	1967	1966	1965	1964	1963
Beans, Lima										
For Canning	35.1	35.5	28.9	24.1	18.1	99	121	145	194	
For Freezing	77.3	80.2	75.6	72.3	60.7	96	102	107	127	
Total	112.4	115.7	104.5	96.4	78.8	97	108	116	143	
Beans, Snap										
For Canning	420.6	468.5	392.4	424.7	346.4	90	107	99	121	
For Freezing	142.9	152.1	129.6	116.0	123.5	94	110	123	116	
Total	563.5	620.6	522.0	540.7	469.9	91	108	104	120	
Beets	213.0	207.0	193.9	178.5	177.8	103	110	119	120	
Cabbage for Kraut 2/										
Corn, Sweet										
For Canning	1,417.3	1,515.7	1,361.4	1,181.0	1,104.8	94	104	120	128	
For Freezing	536.7	578.9	601.0	432.6	375.9	93	89	124	143	
Total	1,954.0	2,094.6	1,962.4	1,613.6	1,480.7	93	100	121	132	
Cucumbers for Pickles	611.3	589.6	534.0	441.6	425.8	104	114	138	144	
Peas, Green										
For Canning	332.5	363.1	311.2	368.2	295.2	92	107	90	113	
For Freezing	215.4	218.8	197.8	233.7	187.5	98	109	92	115	
Total	547.9	581.9	509.0	601.9	482.7	94	108	91	114	
Spinach										
For Canning	76.9	75.3	71.0	58.9	78.4	102	108	130	98	
For Freezing	78.9	86.3	74.9	66.3	68.4	91	105	119	115	
Total	155.8	161.6	145.9	125.2	146.8	96	107	124	106	
Tomatoes	5,037.1	5,164.2	4,660.6	4,501.1	4,583.3	98	108	112	110	
Total	9,195.0	9,535.2	8,632.3	8,099.0	7,845.8	96	107	114	117	

Note: Data rounded, but percentage comparisons based on unrounded data.

1/ Computed: Acreage for 1967, times average yield.

2/ Included in early fall cabbage, fresh market and processing combined.

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Lima Beans

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest:	per acre:Production:	Price :	Value
	(1,000 acres)	(tons)	(1,000 tons)(\$ per (ton)	(\$1,000)
<u>1968 Planted Acreage Guide</u> <u>and probable production</u>				
Canning (planted acreage equal to 1967)	39.7	<u>1/</u> .94	35.1	
Freezing (planted acreage equal to 1967)	<u>65.6</u>	<u>1/</u> 1.24	<u>77.3</u>	
Total	105.3		112.4	

Background statistics

Canning

1967 Prel.	39.7	36.2	.98	35.5	163.93	5,821
1966	33.6	32.0	.90	28.9	151.06	4,361
1965	28.4	25.4	.95	24.1	153.56	3,707
1964	23.2	21.5	.84	18.1	152.57	2,763

Freezing

1967 Prel.	65.6	60.9	1.32	80.2	183.01	14,670
1966	67.4	64.9	1.16	75.6	183.08	13,837
1965	61.8	58.6	1.23	72.3	184.50	13,341
1964	56.1	54.4	1.12	60.7	190.23	11,547

Total

1967 Prel.	105.3	97.1	1.19	115.7	177.15	20,491
1966	101.0	96.9	1.08	104.5	174.23	18,198
1965	90.2	84.0	1.15	96.4	176.75	17,048
1964	79.3	75.9	1.04	78.8	181.58	14,310

1/ 1965-67 average yield.

Comments

The total plantings of lima beans for processing in 1967 were up moderately from 1966. Most of the increase was accounted for by a much larger acreage for canning. Despite a substantial increase in the acreage of Fordhooks, total acreage for freezing was slightly less than a year earlier. The acreage of Baby limas was down eight percent.

During the spring of 1967, the lima bean crop was delayed by unfavorable weather. But good growing weather prevailed during the summer except for cool temperatures in late August in Wisconsin, Minnesota and New York which delayed maturity.

The 1967 average yield of lima beans was well above 1966 when lack of rainfall curtailed output in the East. All leading States except Wisconsin reported larger crops in 1966. The total production of lima beans for processing in 1967 was 11 percent more than in the prior year. The production for freezing was up moderately and output for canning was up nearly a fourth.

Canned Lima Beans

The 1967 carryover of lima beans was moderately above the short inventory of the two previous years. The 1967 pack was well above average and the total supply for 1967-68 was nearly a fifth more than in 1966-67. Into the mid-winter of 1967-68, prices for canned limas were generally firm. The total disappearance of canned lima beans in the current season is expected to be at least as large as last season. Nevertheless, the carryover stocks in 1968 are likely to exceed 1967. Therefore, a planted acreage in 1968 equal to 1967 should provide a sufficient production.

1968 Guide - Canning

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production about equal to 1967.

Frozen Lima Beans (see Figure 6)

Holdings of frozen lima beans were moderate during the 1966-67 season. Disappearance was maintained at a high rate, approximately equal to that during the 1965-66 season. Though not burdensome, carryover stocks into the 1967 packing season were well above the small inventory in 1966. As a result of the increase in both carryover and pack in 1967, total supplies this season were moderately larger than in 1966-67. Despite continued strong prices, disappearance of frozen lima beans in the current season has been at a high rate. However, even with a moderate gain in total disappearance for the season, the 1968 carryover is expected to be larger than in 1967.

1968 Guide - Frozen

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 4 percent less than in 1967.

Supply and Disappearance of Processed Lima Beans

Commodity	Marketing Season				
	1967-68	1966-67	1965-66	1964-65	1963-64

Canned Lima Beans

Million cases basis 24/303's

Carryover	.8	.6	.6	1.3	1.8
Pack	4.0	3.5	3.0	2.2	3.1
Total Supply	4.8	4.1	3.6	3.5	4.9
Disappearance	N.A.	3.3	3.0	2.9	3.6
Carryover	N.A.	.8	.6	.6	1.3

Frozen Lima Beans

Million pounds

Carryover	31.6	24.7	24.9	47.0	71.5
Pack	N.A.	151.9	145.5	116.5	117.7
Total Supply	N.A.	176.6	170.4	163.5	189.2
Disappearance	N.A.	145.0	145.7	138.6	142.2
Carryover	N.A.	31.6	24.7	24.9	47.0

N.A. - not available.

Sources: National Canners Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers, and Statistical Reporting Service, USDA.

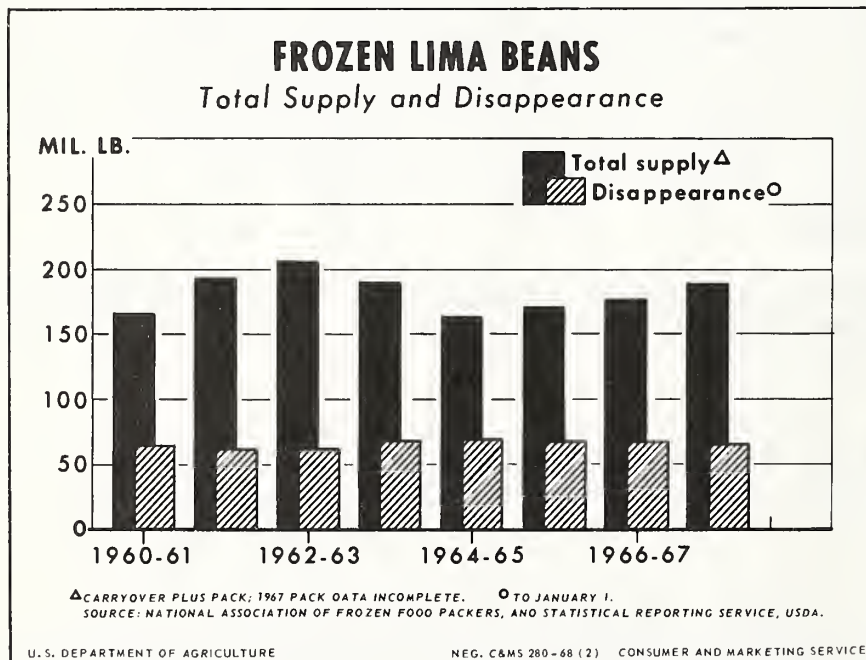


Figure 6

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Snap Beans

Year	: <u>Acreage</u> :	Yield :	:	:		
	: <u>Planted:</u>	<u>For harvest:</u>	<u>per acre</u>	<u>Production:</u>	<u>Price :</u>	<u>Value</u>
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)	
1968 Planted Acreage Guide <u>and probable production</u>						
Canning (acreage 5 percent less than in 1967)	213.1	<u>1/</u> 2.1	420.6			
Freezing (acreage equal to 1967)	<u>71.6</u>	<u>1/</u> 2.1	<u>142.9</u>			
Total	284.7		563.5			

Background statistics

Canning

1967 Prel.	224.3	210.3	2.2	468.5	99.56	46,643
1966	199.6	183.1	2.1	392.4	97.92	38,420
1965	192.9	178.8	2.4	424.7	94.08	39,958
1964	173.2	163.3	2.1	346.4	98.63	34,166

Freezing

1967 Prel.	71.6	65.6	2.3	152.1	111.13	16,900
1966	66.6	62.4	2.1	129.6	109.58	14,198
1965	53.6	51.9	2.2	116.0	105.96	12,286
1964	57.1	53.6	2.3	123.5	110.42	13,634

Total

1967 Prel.	295.9	275.9	2.2	620.6	102.39	63,543
1966	266.2	245.5	2.1	522.0	100.82	52,618
1965	246.5	230.7	2.3	540.7	96.63	52,244
1964	230.3	216.9	2.2	469.9	101.73	47,800

1/ 1966 average yield.

Comments

The total snap bean acreage has been increased substantially each year since 1962. Larger plantings in 1967 were reported for both canning and freezing. The acreage for canning was up 12 percent compared with 1966, and acreage for freezing was up 8 percent. The increase was concentrated in the East and the far West, although acreage in Michigan was up one-fourth.

Average yield in 1967 was less than it might otherwise have been largely because of a further shift away from the pole-type to less productive bush-type varieties in the Pacific Northwest. Although heavy rains restricted output at various times during the 1967 season, the generally abundant moisture in the East contributed to a much improved yield as compared with 1966.

The total 1967 production for canning and freezing combined was almost one-fifth more than in 1966. All producing areas except Colorado and Texas reported an increase in production in 1967. The total production for canning in 1967 was 19 percent above 1966, and production for freezing was up 17 percent.

Canned Snap Beans

Even though total supplies of canned snap beans available for the 1966-67 season were down moderately from 1965-66, shipments continued at a high rate during most of the season. The total disappearance for 1966-67 was a little larger than in the previous season. The carryover into the 1967-68 season was light and partly offset the 1967 pack which was record large, and 31 percent above the relatively light 1966 pack.

Despite the substantial increase in supplies in the current season (see Figure 7), prices for canned snap beans have held strong into the early winter of 1967-68. The total disappearance for the 1967-68 season will probably be at least moderately larger than in 1966-67. Nevertheless, carryover in 1968 is expected to be much larger than in 1967. Thus, 1968 pack requirements could be adequately supplied with the production from a smaller acreage.

1968 Guide - Canning

The 1968 guide is a planted acreage 5 percent less than in 1967. Such an acreage, with normal abandonment and a 1966 average yield, will result in a production 10 percent less than in 1967.

Frozen Snap Beans

An extremely high rate of movement was maintained for the large volume of frozen snap beans available during the 1966-67 season. The total disappearance for the season was record high, exceeding by a wide margin the previous record attained in 1962-63. Nevertheless, 1967 carryover stocks were larger than in 1966 and the indicated 1967 pack was substantially larger than in 1966. The total supplies available for the current marketing season were moderately higher than a year ago.

Disappearance during 1967-68 is expected to continue at a relatively high rate, although the gain in volume may not be as large as it was in 1966-67. Larger supplies of other closely competing processed vegetables may tend to restrict demand somewhat. As a result, a relatively large carryover of frozen snap beans is likely in 1968. An equal acreage in 1968 should furnish an adequate tonnage for the 1968 pack.

1968 Guide - Freezing

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1966 average yield, will result in a production 6 percent less than in 1967.

Supply and Disappearance of Processed Snap Beans

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Canned Snap Beans

Million cases basis 24/303's

Carryover	7.8	10.4	7.1	9.3	9.6
Pack	53.2	40.5	45.6	37.4	37.7
Total Supply	61.0	50.9	52.7	46.7	47.3
Disappearance	N.A.	43.1	42.3	39.6	38.0
Carryover	N.A.	7.8	10.4	7.1	9.3

Frozen Snap Beans

Million pounds

Carryover	48.2	40.6	52.1	50.8	44.8
Pack	N.A.	231.8	189.5	187.5	170.2
Total Supply	N.A.	272.4	241.6	238.2	215.0
Disappearance	N.A.	224.2	201.0	186.1	164.2
Carryover	N.A.	48.2	40.6	52.1	50.8

N.A. not available.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers, and Statistical Reporting Service, USDA.

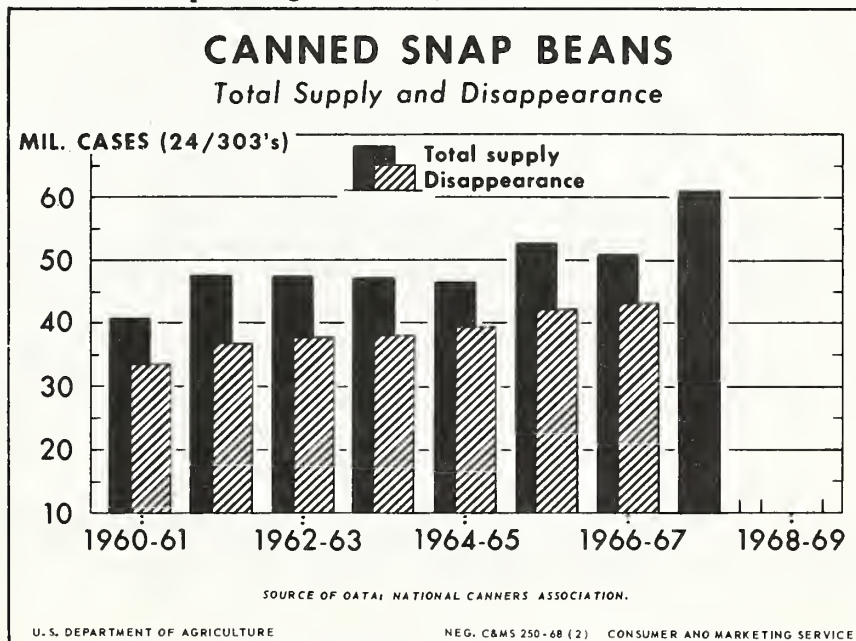


Figure 7

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Beets

Year	: Acreage :	Yield :	:	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	: Value	
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)	
<u>1968 Planted Acreage Guide</u> <u>and probable production</u> (acreage equal to 1967)						
	19.5	<u>1</u> / 11.6	213.0			
<u>Background statistics</u>						
1967 Prel.	19.5	17.6	11.7	207.0	20.71	4,286
1966	17.7	17.0	11.4	193.9	19.98	3,874
1965	15.7	14.5	12.3	178.5	18.32	3,271
1964	17.0	16.2	11.0	177.8	19.04	3,385
<u>1/ 1964-67 average yield.</u>						

Comments

In accord with the strong 1966-67 market for canned beets and the prospective light carryover indicated, the total acreage of beets for canning was increased by 10 percent in 1967, and was the largest acreage on record. Larger plantings were reported in all major producing States (see crop trends, Figure 8).

In the Midwest and West, crops were delayed because of excessive rains at planting time, but drought was a problem as the season progressed. As in 1966, dry summer weather limited yield per acre in Wisconsin, as did extremely hot weather in Oregon. Rainfall in New York, however, was plentiful and yield was above average. Average yield for the United States was slightly above 1966. With a much larger acreage and a higher yield, total production in 1967 was 7 percent more than in 1966.

The 1967 pack was indicated to be substantially above 1966. Consequently total supplies at the beginning of the 1967-68 season were well above the previous year. Nevertheless, prices for canned beets have continued at high levels. Disappearance is expected to continue at a high rate during the 1967-68 season. However, carryover into the 1968 packing season may be substantially larger than in 1967. A balanced supply position in 1968-69 would require an equal acreage for processing in 1968, providing growing conditions are normal.

1968 Guide

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1964-67 average yield, will result in a production 3 percent more than in 1967.

Supply and Disappearance of Canned Beets

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Canned Beets

Million cases basis 24/303's

Carryover	3.3	3.2	4.7	5.8	4.6
Pack <u>1</u> /	N.A.	11.4	10.0	10.2	12.1
Total Supply	N.A.	14.6	14.7	16.0	16.7
Disappearance	N.A.	11.3	11.5	11.3	10.9
Carryover	N.A.	3.3	3.2	4.7	5.8

N.A. - Not available

1/ July 1 - June 30 basis.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce, and Statistical Reporting Service, USDA.

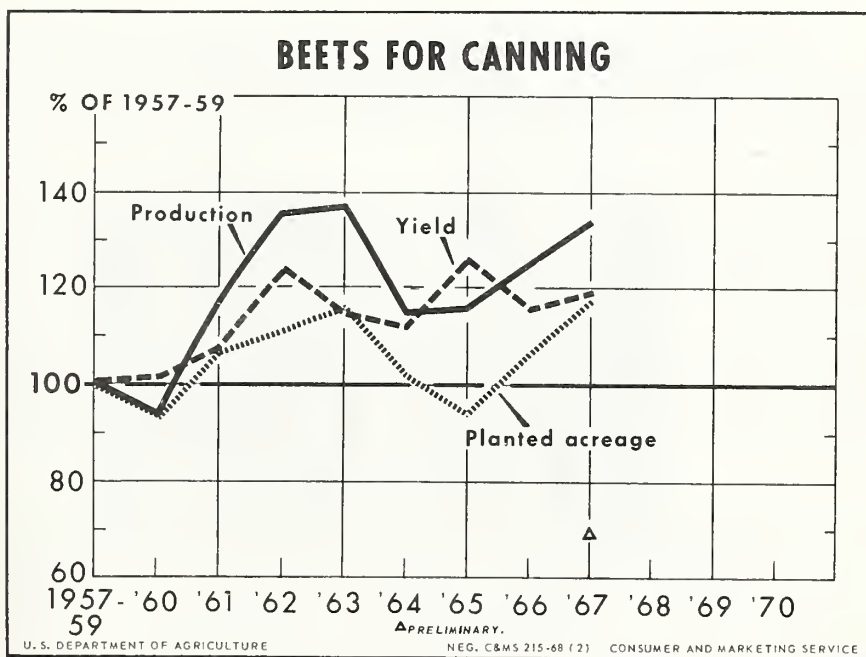


Figure 8

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cabbage - Early Fall
(Fresh Market and Processing)

Year	: Acreage	: Yield	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	Value
	(acres)	(cwt.)	(1,000 cwt.)	(\$ per cwt.)	(\$1,000)

1968 Acreage Guide and
probable production

(acreage equal to
1967)

31,310

1/ 288

8,566

Background statistics

1967 Prel.	31,310	29,710	316	3/ 9,395	1.53	13,623
1966	30,900	29,000	261	3/ 7,555	2.96	21,946
1965 2/	33,880	31,980	288	3/ 9,203	1.53	13,394
1964	32,060	30,540	260	3/ 7,927	2.29	17,814

1/ 1965-67 average yield.

2/ Excludes Utah.

3/ Includes the following quantities (in 1,000 cwt.) not marketed and excluded in computing value: 484 in 1967, 148 in 1966, 465 in 1965, and 164 in 1964.

Comments

The total acreage of early fall cabbage for fresh market and processing was increased slightly in 1967. A short-supply position had developed in sauerkraut supplies in the previous season and acreage of contract cabbage was increased almost one-third in 1967.

In the Midwest, wet weather held up plantings and caused some damage to early acreage. In the Northwest, hot weather was a problem. But for the most part, crops made favorable progress during the summer. Weather was a problem at harvest in several States. In Michigan and Wisconsin, freezing temperatures resulted in some crop abandonment. Nevertheless the 1967 output was large. The total early fall production, the major source for cabbage for sauerkraut, was 25 percent larger than the small 1966 crop. In addition, the late summer crop, another source for kraut, was up 14 percent compared with 1966.

The 1967 pack is expected to be substantially larger than the relatively small output in 1966 (see Figure 9). In contrast to last season, kraut supplies during the remainder of 1967-68 are expected to be large enough to meet normal market requirements. Although, total disappearance in the current season is expected to be substantially larger than in 1966-67, carryover into the 1968 season is likely to be above that in 1967. Thus a smaller pack in 1968 compared with 1967 would be adequate to replenish supplies. With an average yield, an acreage in 1968 equal to 1967 should be large enough to

provide the production required.

1968 Guide

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1965-57 average yield, will result in a production 9 percent less than in 1967.

Supply and Disappearance of Sauerkraut

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Sauerkraut

Million cases basis 24/303's

Carryover	2.4	3.1	2.7	4.3	4.3
Pack	N.A.	10.4	12.1	8.3	10.2
Total Supply	N.A.	13.6	15.8	12.6	14.5
Disappearance	N.A.	11.2	12.7	9.9	10.2
Carryover	M.A.	2.4	3.1	2.7	4.3

N. A. - Not available.

Source: National Kraut Packers Association, and Bureau of the Census, U.S. Department of Commerce.

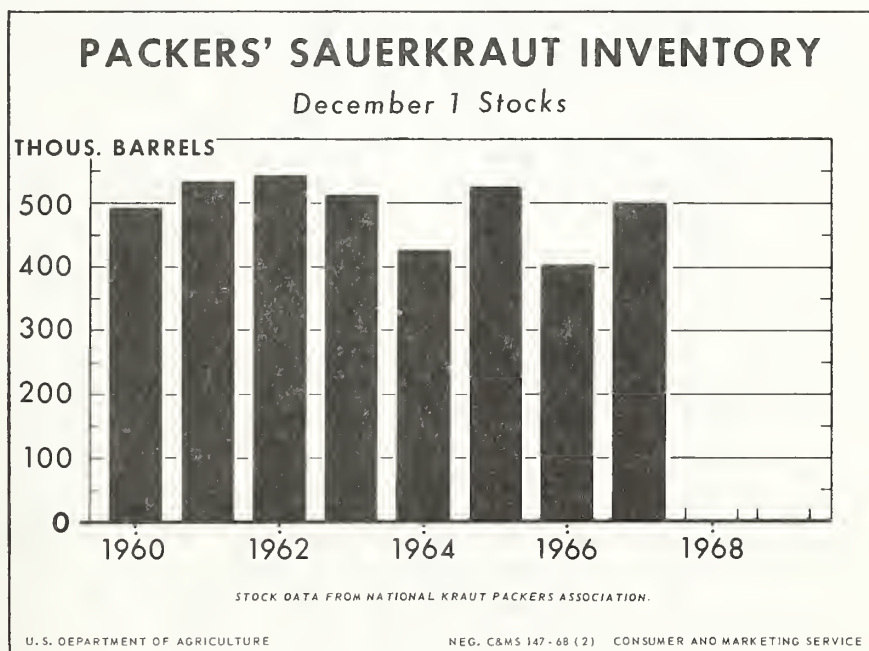


Figure 9

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Sweet Corn

Year	Acreage		Yield			
	:Planted:	For harvest:	per acre	:Production:	Price	:Value
	(1,000 acres)		(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
<u>1968 Planted Acreage Guide</u> <u>and probable production</u>						
Canning (acreage 5 percent less than in 1967)	362.5		<u>1/</u> 4.25	1,417.3		
Freezing (acreage 5 percent less than in 1967)						
Total	<u>121.5</u>		<u>1/</u> 4.75	<u>536.7</u>		
	484.0			1,954.0		
<u>Background statistics</u>						
<u>Canning</u>						
1967 Prel.	381.6	352.5	4.30	1,515.7	23.63	35,808
1966	340.6	323.8	4.20	1,361.4	21.83	29,717
1965	323.0	277.3	4.26	1,181.0	21.76	25,703
1964	284.8	271.6	4.07	1,104.8	19.81	21,887
<u>Freezing</u>						
1967 Prel.	127.9	116.6	4.97	578.9	28.26	16,362
1966	129.2	121.8	4.93	601.0	24.83	14,920
1965	107.6	99.4	4.35	432.6	24.17	10,456
1964	85.1	81.4	4.62	375.9	22.07	8,298
<u>Total</u>						
1967 Prel.	509.5	469.1	4.47	2,094.6	24.91	52,170
1966	469.8	445.6	4.40	1,962.4	22.75	44,637
1965	430.6	376.7	4.28	1,613.6	22.41	36,159
1964	369.9	353.0	4.19	1,480.7	20.39	30,185
<u>1/ 1965-67 average yield.</u>						

Comments

The total 1967 acreage for canning was a record (see Figure 10). However, total acreage for freezing was reduced slightly compared with the 1966 record plantings. In most producing areas, cold, wet spring weather delayed planting and initial growth of the crop. In the East, moisture was adequate in contrast to the prior year when drought damaged the crop. Open fall weather permitted an extended harvest in the Midwest, the major source of production for canning. In the West, high summer temperatures resulted in relatively light yields, harvest bunching, and overmaturity. In Washington, an important source of production for freezing, extreme heat resulted in some acreage being by-passed.

Minnesota, Wisconsin and Washington, in that order, were the leading States in production. The total production for canning in 1967 was a record, and 11 percent above 1966. Output for freezing was moderately below the record tonnage in 1966.

Canned Sweet Corn

For several seasons, canned supplies have been in line with market requirements. And the small canned carryover into the 1967-68 season was a partial offset to the 1967 near-record pack (see Figures 11 and 12). The total supply of canned corn at the start of the 1967-68 season was 8 percent above last season. Into the early winter of 1967-68, cumulative shipments of canned corn were slightly less than in the like period last year. In spite of larger holdings, however, prices for canned corn have been firm. The total shipments this season, are likely to compare closely with the total disappearance reported in 1966-67. However, the 1968 canned carryover is expected to be relatively high. As a result, a reduction is recommended in next season's production of sweet corn for canning.

1968 Guide - Canning

The 1968 guide is a planted acreage 5 percent less than in 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 6 percent less than in 1967.

Frozen Sweet Corn

The frozen sweet corn pack in 1967 was indicated to be moderately less than the 1966 record pack. But a larger carryover this season about offset the smaller pack and total supply available for the 1967-68 season was slightly above last season. Cumulative disappearance of frozen sweet corn has been at a relatively high rate. Nevertheless, prices have been firm. Disappearance of frozen sweet corn last season was a record, due partly to supplies being reworked and canned. Disappearance of the frozen pack this season may not match last year's record. Consequently, the 1965 carryover likely will exceed that in 1967.

1968 Guide - Freezing

The 1968 guide is a planted acreage 5 percent less than in 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 7 percent less than in 1967.

Supply and Disappearance of Processed Sweet Corn

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Canned Sweet Corn

Million cases basis 24/303's

Carryover	4.5	4.1	6.3	11.5	12.2
Pack	49.3	45.5	39.1	37.6	44.2
Total Supply	53.8	49.6	45.4	49.0	56.4
Disappearance	N.A.	45.1	41.3	42.8	44.9
Carryover	N.A.	4.5	4.1	6.3	11.5

Frozen Sweet Corn

Million pounds

Carryover	46.1	30.1	21.4	39.5	50.5
Pack	N.A.	344.4	262.5	187.6	179.9
Total Supply	N.A.	374.5	283.9	227.1	230.4
Disappearance	N.A.	328.4	253.8	205.7	190.9
Carryover	N.A.	46.1	30.1	21.4	39.5

N.A. - Not available.

Source: National Canners Association; Bureau of the Census, U. S. Department of Commerce; National Association of Frozen Food Packers and Statistical Reporting Service, USDA.

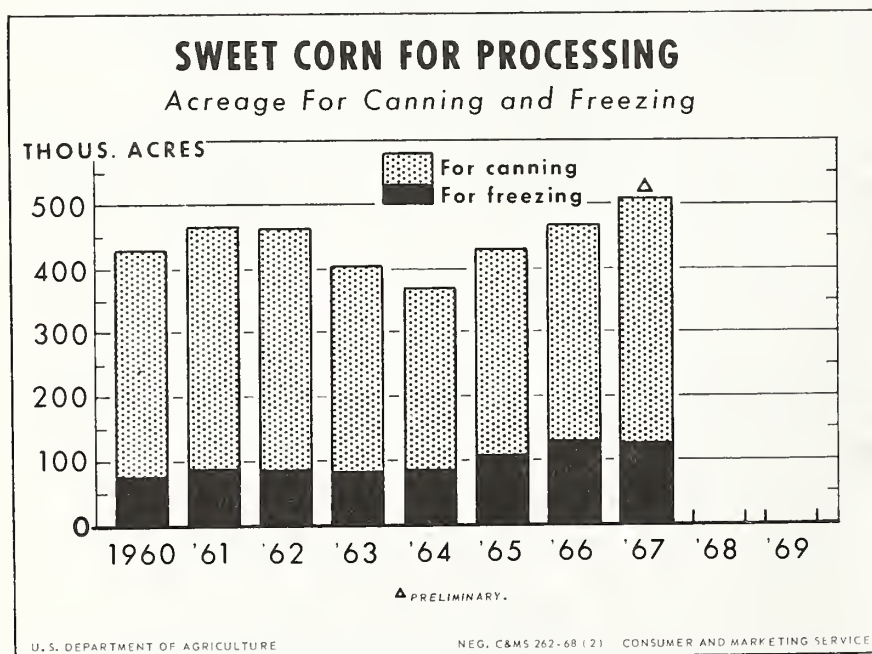


Figure 10

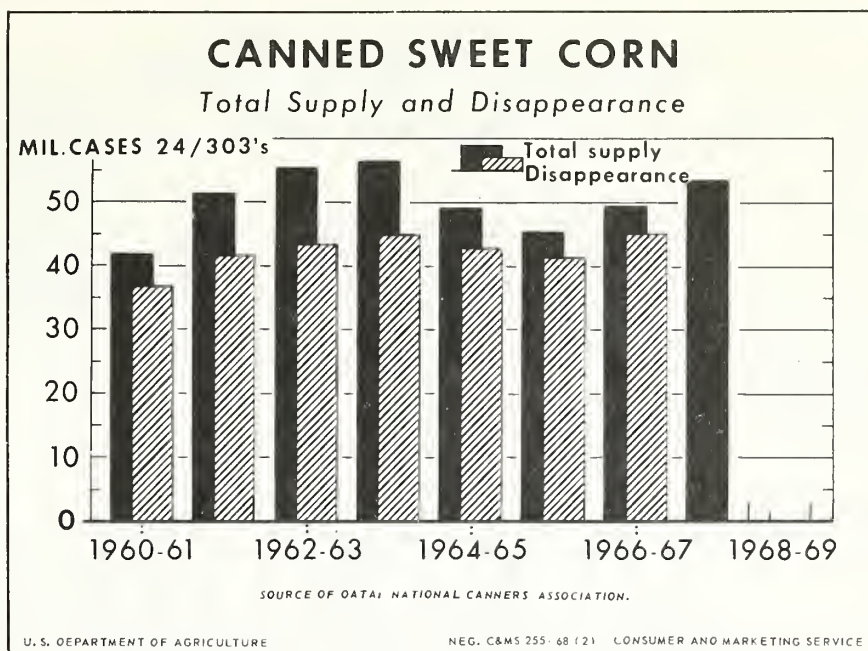


Figure 11

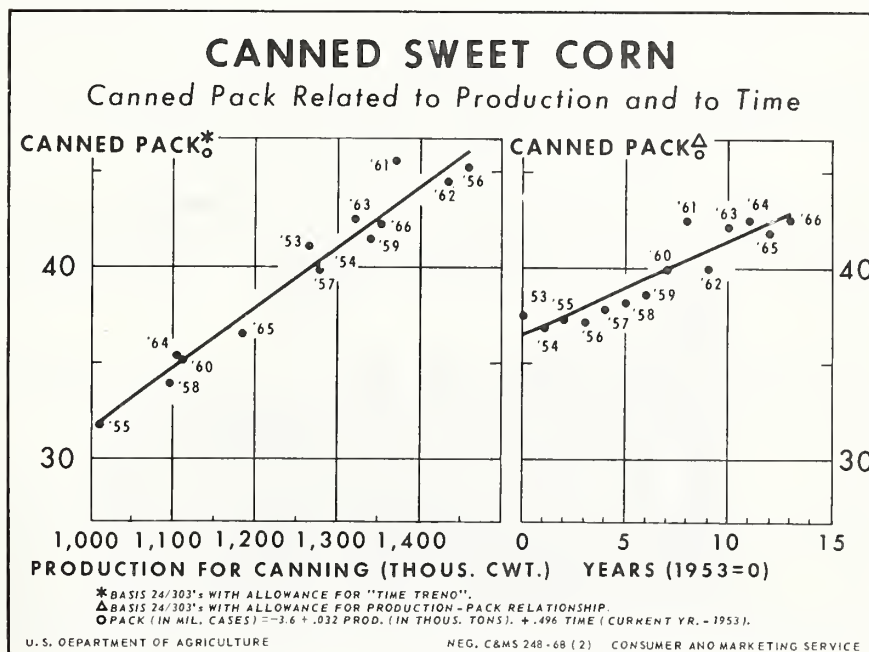


Figure 12

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cucumbers for Pickles

Year	: <u>Acreage</u> :	Yield :	:	:
	: <u>Planted: For harvest:</u>	per acre :	<u>Production:</u>	<u>Price: Value</u>
	(1,000 acres)	(tons)	(1,000 tons)	(\$per (\$1,000 ton)
<u>1968 Planted Acreage Guide</u> <u>and probable production</u> (acreage equal to 1967)				
	164.3	<u>1/</u> 4.00	611.3	
<u>Background statistics</u>				
1967 Prel.	164.3	152.8	3.86	589.6 91.62 54,021
1966	146.6	129.6	4.12	534.0 82.22 43,901
1965	114.4	107.6	4.10	<u>2/</u> 441.6 75.99 32,517
1964	116.5	108.9	3.91	425.8 65.82 28,025

1/ 1964-67 average yield.

2/ Includes 13,630 tons not marketed and excluded in computing value.

Comments

Total plantings of cucumbers for pickles in 1967 were up 12 percent from 1966. This was the second successive year that acreage was increased substantially. In contrast to 1966, the increase in 1967 was confined largely to major producing States in the North and West. Combined plantings in Michigan and Wisconsin were nearly a third larger than a year earlier. Also, large acreage increases were reported in Colorado and in California.

The average yield per acre in 1967 was down moderately from 1966, largely because of weather damage in Michigan and Wisconsin. Although crops in the South and the West were delayed by excessive rain and low temperatures during the spring, weather improved later in the season.

The total output in 1967 was a tenth larger than the previous record in 1966. The unexpectedly low production in the northern region of the country was offset by much larger crops in both the South and West.

Market demand for pickles was excellent during the 1966-67 season. Prices were satisfactory, and estimated disappearance was exceedingly large, and well above the previous record reached in 1965-66. But carryover stocks, including salt, dill, and fresh pack, on October 1, 1967 were well above the moderate level a year earlier. More importantly, supplies from the large current year's pack were up substantially from 1966. Consequently, the indicated total supply for 1967-68 is relatively large.

The uptrend in pickle disappearance is expected to continue (see Figure 13). Nevertheless, the 1968 carryover of pickles will be substantial.

1968 Guide

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1964-67 average yield, will result in a production 4 percent more than in 1967.

Supply and Disappearance of Pickles

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64
Thousand tons					
October 1 Stocks	53.4	37.1	71.5	77.6	52.9
Production	589.6	534.0	<u>1/</u> 441.6	425.8	466.7
Total Supply	643.0	571.1	513.1	503.4	519.6
Disappearance	N.A.	517.7	476.0	431.9	442.0

N.A. - Not available.

1/ Includes 13,630 tons not marketed.

Source: Statistical Reporting Service, USDA.

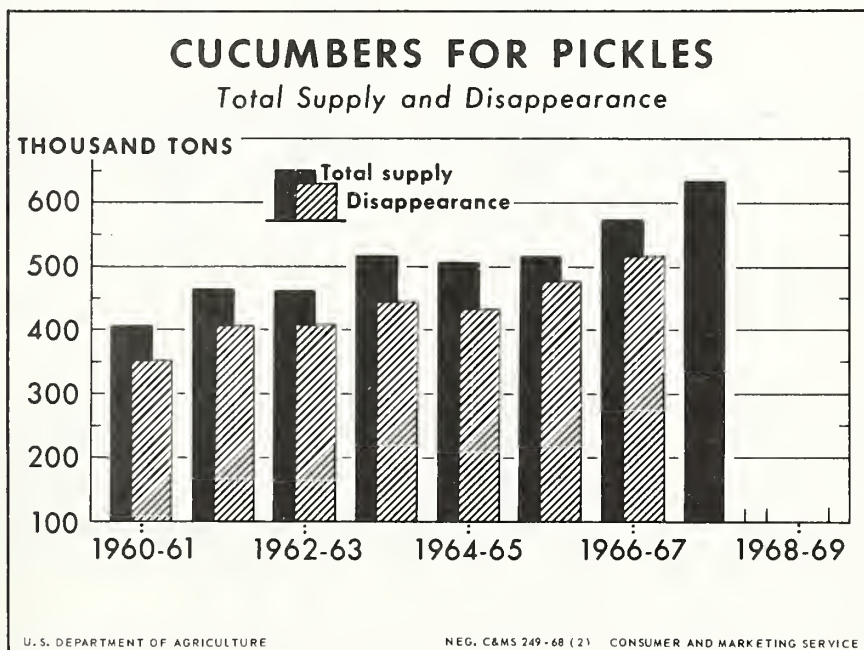


Figure 13

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Green Peas

Year	: Acreage	: Yield	:	:	:	:
	: Planted	: For harvest	: per acre	: Production	: Price	: Value
	(1,000 acres)		(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
<u>1968 Planted Acreage Guide and probable production</u>						
Canning (acreage 5 percent less than in 1967)	299.3		<u>1/</u> 1.182	332.5		
Freezing (acreage equal to 1967)	<u>169.0</u>		<u>1/</u> 1.356	<u>215.4</u>		
Total	468.3			547.9		
<u>Background statistics</u>						
<u>Canning</u>						
1967 Prel.	315.0	298.2	1.218	363.1	111.25	40,392
1966	313.2	284.4	1.094	311.2	108.39	33,735
1965	293.8	281.9	1.306	368.2	99.95	36,797
1964	279.2	266.6	1.108	295.2	94.79	27,982
<u>Freezing</u>						
1967 Prel.	169.0	156.9	1.394	218.8	105.07	22,983
1966	162.9	149.7	1.322	197.8	98.50	19,488
1965	168.7	159.8	1.463	233.7	99.53	23,265
1964	157.8	150.8	1.243	187.5	100.19	18,785
<u>Total</u>						
1967 Prel.	484.0	455.1	1.278	581.9	108.93	63,375
1966	476.1	434.1	1.173	509.0	104.54	53,223
1965	462.5	441.7	1.363	601.9	99.79	60,062
1964	437.0	417.4	1.156	482.7	96.89	46,767

1/ 1964-67 average yield.

Comments

The total acreage of green peas for processing was increased moderately in 1967, with most of the gain in acreage for freezing. A cold, wet April was unfavorable for the crop. A wet season in the Mid-west, the major source of the crop for canning, resulted in harvesting difficulties. And hot weather shortened the harvesting period in some areas in the West, where most of the output is used by freezers. Nevertheless, yields were above average in the East, and average in other regions.

Production of green peas for both canning and freezing was substantially above 1966. The total production in 1967 was 14 percent above the short 1966 crop, but well below the 1965 record. Wisconsin, Washington and Minnesota, in that order, were the top States in output.

Canned Peas

For several years, the total disappearance of canned peas has held within a narrow range.

Carryover stocks in 1967-68 were relatively light and partly offset the large pack in 1967. The total canned supply available for the 1967-68 marketing season was 10 percent above 1966-67.

Cumulative shipments of canned peas this season have been moderately less than in the like period last year. However, movement during the late fall was much higher than a year ago. In spite of a relatively large inventory, prices for canned peas are steady. Carryover stocks in 1968 are expected to be large. Therefore, a reduction is recommended in the 1968 production for canning.

1968 Guide - Canning

The 1968 guide is a planted acreage 5 percent less than in 1967. Such an acreage, with normal abandonment and a 1964-67 average yield, will result in a production for canning 8 percent less than in 1967.

Frozen Green Peas (see Figure 14)

The 1967 pack of frozen green peas was the second largest on record, and 5 percent above 1966. However, carryover stocks were small, and the total supply at the beginning of the 1967-68 season was only slightly above 1966-67, and well below the 1965-66 record. Prices for frozen peas have been generally firm, and equal to last season. The total disappearance of frozen green peas this season is expected to be high, and the 1968 carryover is expected to be moderate. Therefore, no change is recommended in the acreage of green peas for freezing.

1968 Guide - Freezing

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1964-67 average yield, will result in a production 2 percent less than in 1967.

Supply and Disappearance of Processed Green Peas

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Canned Green Peas

Million cases basis 24/303's

Carryover	7.1	8.8	5.9	8.0	6.9
Pack	37.7	31.9	37.6	30.0	33.6
Total Supply	44.8	40.6	43.5	38.0	40.5
Disappearance	N.A.	33.5	34.7	32.1	32.5
Carryover	N.A.	7.1	8.8	5.9	8.0

Frozen Green Peas

Million pounds

Carryover	100.5	115.0	97.5	100.7	98.9
Pack	395.9	375.4	443.3	336.9	344.8
Total Supply	496.4	490.3	540.8	437.6	433.7
Disappearance	N.A.	389.8	425.8	340.1	343.0
Carryover	N.A.	100.5	115.0	97.5	100.7

N.A. - Not available.

Sources: National Canners Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and the Statistical Reporting Service, USDA.

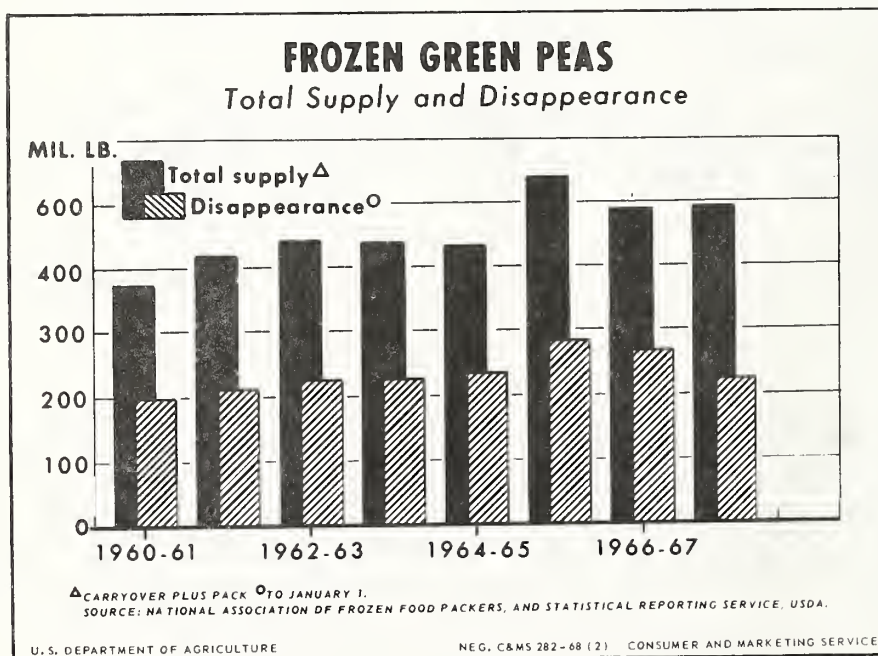


Figure 14

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Spinach

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest: per acre :Production: Price : Value			
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per (\$1,000 ton)

1968 Planted Acreage Guide
and probable production

Canning (acreage equal to 1967)	14.6	<u>1/</u> 5.9	76.9
---------------------------------	------	---------------	------

Freezing (acreage 10 percent less than in 1967)	<u>14.8</u>	<u>1/</u> 5.8	<u>78.9</u>
Total	29.4		155.8

Background statistics

Canning

1967 Prel.	14.6	12.9	5.8	75.3	40.48	3,049
1966	13.1	11.9	6.0	71.0	41.16	2,920
1965	12.8	9.7	6.0	58.9	38.83	2,288
1964	15.3	13.7	5.7	78.4	36.72	2,881

Freezing

1967 Prel.	16.4	14.7	5.9	86.3	41.12	3,548
1966	13.8	12.9	5.8	74.9	41.58	3,115
1965	13.6	11.7	5.7	66.3	40.49	2,684
1964	12.7	11.6	5.9	68.4	40.10	2,749

Total

1967 Prel.	31.0	27.6	5.8	161.6	40.82	6,597
1966	26.9	24.8	5.9	145.9	41.37	6,035
1965	26.4	21.4	5.9	125.2	39.90	4,972
1964	28.0	25.3	5.8	146.9	38.34	5,630

1/ 1965-67 average yield.

Comments

The well-balanced stocks of processed spinach in relation to market requirements during the 1966-67 season led to substantially larger plantings for both canning and freezing in 1967 as compared to 1966. This was the second successive year that acreage was increased, and followed a long-term downward trend in total acreage.

Yield per acre in 1967 was slightly below the record attained in the two prior years. Poor weather forced heavy acreage abandonment and resulted in low yields in spring crop States. But in the winter crop areas in California and Florida, a high yield was obtained. Also, 1967 yields were satisfactory in fall areas.

In total, the 1967 production was an all-time record and 11 percent more than in 1966 (see Figure 15). Most of the increase in production was utilized for freezing, with production for canning up moderately. Spring-season production was down sharply from a year earlier. But this was more than offset by a large winter crop. Winter production in California, which accounted for half the U.S. total, was nearly a third larger than in 1966. With less acreage, 1967 output in Florida was down slightly.

Canned

With the 1967 carryover of canned spinach relatively light, plans were made for a 1967 spring pack larger than in 1966. The 1967 spring pack was up 8 percent from 1966.

The 1967 spring and summer supplies for marketing were moderately larger than in 1966. But reflecting the strong market, shipments from March 1, 1967 through December 31, were moderately larger than during the like period a year earlier. Prices for canned spinach have been firm.

Carryover into the 1968 packing season is expected to show a moderate gain compared with 1967. Therefore, a 1968 acreage equal to 1967 should provide a production large enough to meet 1968 pack requirements.

1968 Guide - Canning

The 1968 guide is a planted acreage equal to 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 2 percent larger than in 1967.

Frozen Spinach

Disappearance of frozen spinach during the 1966-67 season was a record and was up substantially from the previous season. Despite the high rate of disappearance, the 1967 carryover of frozen spinach was above 1966. Moreover, a much larger spinach pack in the West more than offset a sharp decrease in other areas. And the total 1967 spring pack exceeded that in 1966. As a result, a record supply of frozen spinach was available during 1967.

Disappearance of frozen spinach has continued at a high rate. But the 1968 carryover is expected to be quite large. Consequently, a 1968 pack somewhat smaller than in 1967 would be in line with 1968-69 market needs.

1968 Guide

The 1968 guide is a planted acreage 10 percent less than in 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 9 percent less than in 1967.

Supply and Disappearance of Processed Spinach

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64

Canned Spinach

Million cases basis 24/303's

Carryover	2.9	3.0	4.0	3.5	2.8
Pack	N.A.	7.0	6.4	7.6	8.0
Total Supply	N.A.	10.0	10.4	11.1	10.8
Disappearance	N.A.	7.1	7.4	7.1	7.3
Carryover	N.A.	2.9	3.0	4.0	3.5

Frozen Spinach

Million pounds

Carryover	34.7	30.4	38.2	35.1	25.6
Pack	N.A.	142.9	122.3	127.0	119.8
Total Supply	N.A.	173.3	160.5	162.1	145.3
Disappearance	N.A.	138.6	130.1	123.9	110.2
Carryover	N.A.	34.7	30.4	38.2	35.1

N.A. - Not available.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers, and the Statistical Reporting Service, USDA.

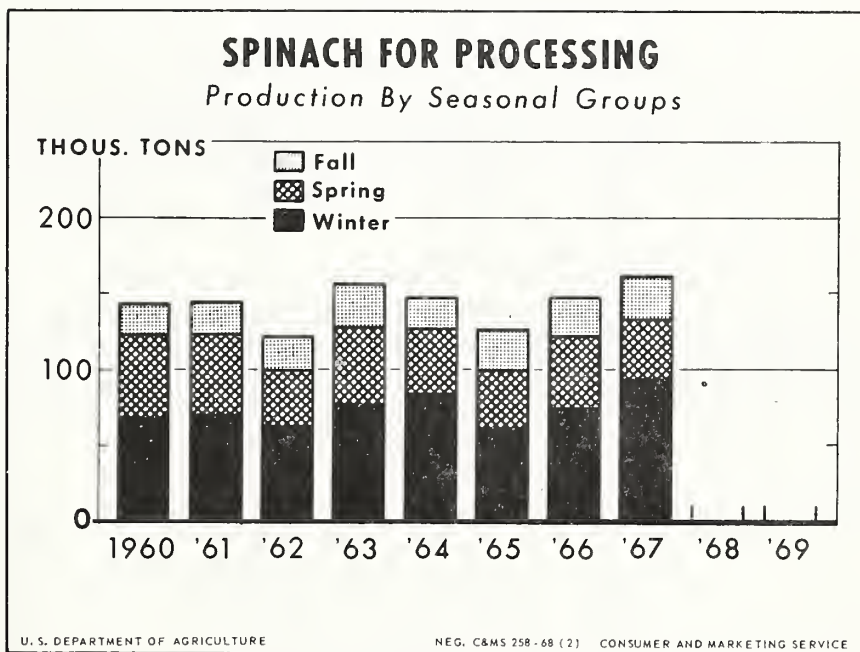


Figure 15

1968 Acreage-Marketing Guides
Vegetables for Commercial Processing

Tomatoes

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest: per acre :Production: Price : Value			
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per (\$1,000 ton)

1968 Planted Acreage Guide
and probable production

(planted acreage 5 percent
less than in 1967) 315.3

1/ 16.3 5,037.1

Background Statistics

1967 Prel.	331.9	326.1	15.8	5,164.2	42.64	220,218
1966	306.0	300.1	15.5	4,660.6	35.69	166,345
1965	261.0	257.4	17.5	4,501.1	37.16	163,913
1964	276.1	273.4	16.8	4,583.3	30.72	140,810

1/ 1965-67 average yield.

Comments

Supplies of canned tomatoes and tomato products were light relative to market requirements during the 1966-67 season. And tomato processors contracted for more acreage in 1967. The total planted acreage in 1967 was 8 percent above 1966 and was the largest planting since 1958. In California, the top tomato State, acreage was increased 14 percent. In the other leading States, Ohio, New Jersey and Indiana, acreage showed little change compared with 1966.

Planting and early growth of the 1967 tomato crop was delayed by unusually cold, wet spring weather. But summer weather was favorable for crop development in most producing areas except Delaware and Maryland where there was some damage from late summer rains. Prolonged warm fall weather in the Midwest resulted in an extended harvest season. The California crop matured extremely late and harvest was active well into October. Open fall weather permitted complete harvest of the California crop.

In the East and Midwest, average yield was much higher than a year earlier when drought conditions prevailed. The U.S. average yield, however, was close to that in 1966 because of a much lower yield in California. The total U.S. production in 1967, nevertheless, was 11 percent more than in 1966, and was the second largest crop on record, exceeded only in 1962.

Canned (Peeled) Tomatoes

The 1966-67 total supply of canned tomatoes was the smallest in several years (see Figure 16). Partly a result of firm prices, total disappearance during the 1966-67 season was below average. However, carryover into the 1967-68 season also was small. The 1967 pack at 39.1 million cases, basis 24/303's, was a record and one-fifth above 1966. All principal producing

areas reported substantial increases in the 1967 pack of canned tomatoes compared with 1966 when adverse weather resulted in reduced packs. In California, the 1967 pack was 13 percent more than in 1966, and the State was the source of 60 percent of the 1967 total pack, compared with 63 percent in 1966.

In 1967, processors packed a higher percentage of canned tomatoes in 6/10 can size, and a smaller share in the 303 size. The latter size, however, continued as the dominant container by a wide margin.

At the beginning of the 1967-68 shipping season, the total supply of canned tomatoes was 12 percent above last year, and 7 percent above the 1961-65 average. Despite the increase in supply, prices for canned tomatoes continued generally firm into the winter of 1967-68. The 1967-68 total disappearance of canned tomatoes is expected to be high. The growth in population should help to boost sales as will the wide availability of stocks.

But the 1968 carryover of canned tomatoes will likely exceed the small 1967 carryover. Therefore, 1968 pack requirements for canned tomatoes will be slightly less than in 1967.

Tomato Juice

At the beginning of the 1966-67 season, the total supply of tomato juice was well below average. Consequently, the market was firm and total disappearance of tomato juice last season was the smallest since 1960-61. Although the 1967 carryover was small, the 1967 pack was 10 percent above 1966. And the total supply of tomato juice at the beginning of the 1967-68 season was 5 percent above a year earlier (see Figure 17), but 6 percent below the 1961-65 average. Tomato juice prices have been firm. The total disappearance during the 1967-68 season may be less than last season. Therefore, the 1968 carryover may be moderately above the 1967 carryover.

For an adequate supply of tomato juice in 1968-69, the 1968 pack should be almost as large as in 1967.

Catsup and Chili Sauce

The total supply of catsup and chili sauce combined at the beginning of the 1967-68 season was 9 percent above last year (see Figure 18), and 13 percent above the 1961-65 average. A larger carryover and a larger pack in 1967 contributed equally to the larger holdings. The 1967 pack of chili sauce was 22 percent less than the prior year but the catsup pack was up 7 percent.

The total disappearance of catsup and chili sauce in the current season is expected to be moderately higher than in 1966-67. The 1968 carryover, however, may be high. A moderate reduction in the 1968 pack of catsup may be in order to ensure market balance.

1968 Guide

The 1968 guide is a planted acreage 5 percent less than in 1967. Such an acreage, with normal abandonment and a 1965-67 average yield, will result in a production 2 percent less than in 1967.

Supply and Disappearance of Processed Tomatoes and Selected Tomato Products

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64
<u>Canned Tomatoes</u>					
	<u>Million cases basis 24/303's</u>				
Carryover	8.2	9.4	8.7	9.9	10.3
Pack	39.1	32.7	36.0	36.4	33.0
Total Supply	47.3	42.1	44.7	46.3	43.3
Disappearance	N.A.	33.9	35.3	37.6	33.4
Carryover	N.A.	8.2	9.4	8.7	9.9
<u>Tomato Juice</u>					
Carryover	9.3	10.9	12.6	12.7	15.6
Pack	42.8	38.9	40.0	43.1	42.1
Total Supply	52.1	49.8	52.6	55.8	57.7
Disappearance	N.A.	40.5	41.7	43.2	45.0
Carryover	N.A.	9.3	10.9	12.6	12.7
<u>Catsup and Chili Sauce</u>					
Carryover	11.8	9.7	10.9	13.4	16.5
Pack	39.4	37.4	35.6	34.0	29.8
Total Supply	51.2	47.1	46.5	47.4	46.2
Disappearance	N.A.	35.3	36.8	36.5	32.8
Carryover	N.A.	11.8	9.7	10.9	13.4
<u>Total</u>					
Carryover	29.3	30.0	32.2	36.0	42.4
Pack	121.3	109.0	111.6	113.5	104.9
Total supply	150.6	139.0	143.8	149.5	147.2
Disappearance	N.A.	109.7	113.8	117.3	111.2
Carryover	N.A.	29.3	30.0	32.2	36.0

N.A. - Not available.

Sources: National Canners Association and Bureau of the Census, U.S. Department of Commerce.

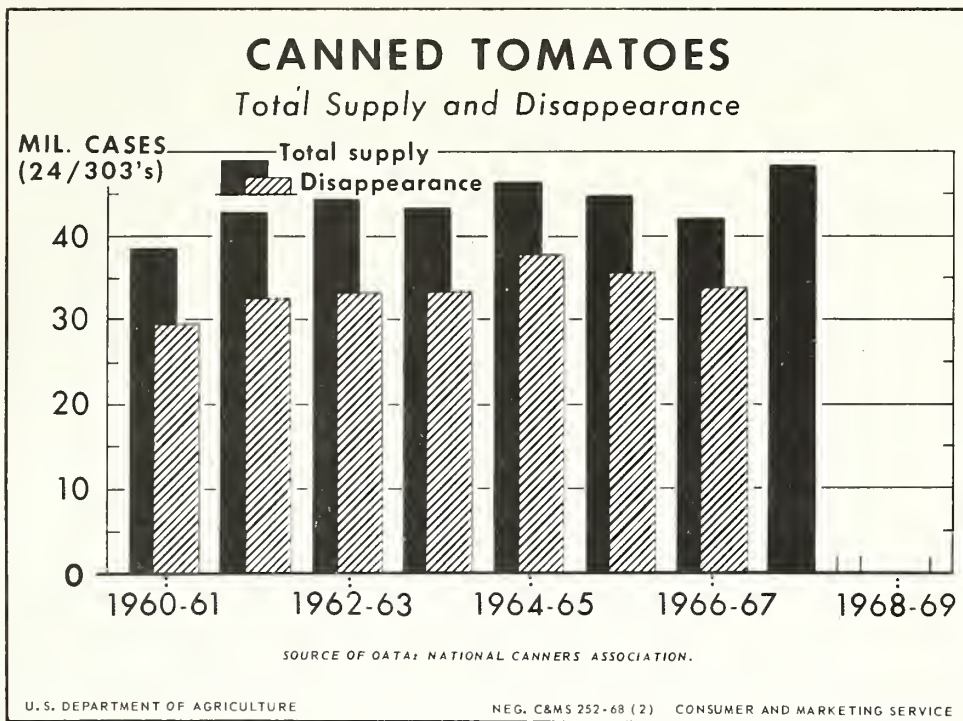


Figure 16

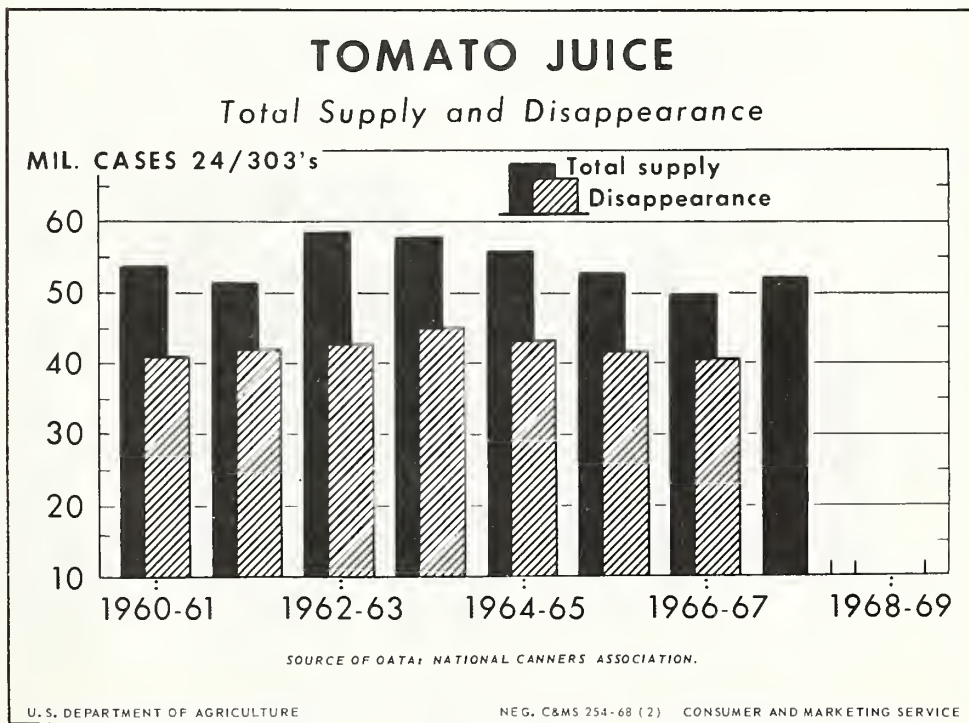


Figure 17

Official Business

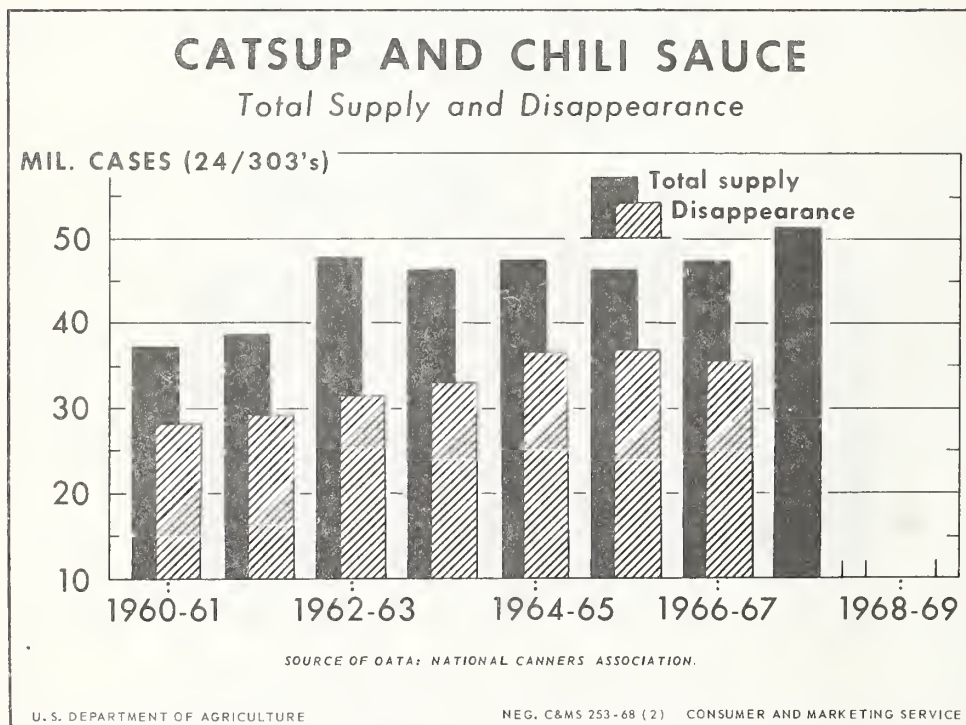


Figure 18

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